

**CALL FOR PRESENTERS (CFP)**  
**Spring 2000**  
**Volunteer E-rate Trainer (VET)**

**Description of the project:** This Call For Presenters (CFP) seeks to identify one or more vendor volunteers to assist the California Department of Education (CDE) in preparing and delivering training for California public schools regarding primarily the federal Universal Service Fund for Schools and Libraries, popularly known as the "E-rate," and also the California Teleconnect Fund (CTF). There will be no exchange of funds, goods or services, nor endorsements associated with a vendor being selected as a Volunteer E-rate Trainer (VET). A main goal is to expand California public education's participation in these programs, particularly those Local Education Agencies (LEAs) who have thus far not applied or who are underrepresented in securing discounts.

**Eligible applicants:** Any vendor may apply. Selection will be weighted toward vendors whose experience with the E-rate and/or CTF program is substantial and whose record is positive in the area of delivering E-rate training. Applicants may be individuals, companies, corporations, or other vendors.

**Deadlines**



**(1) (Optional) Monday, May 22, 2000** an Intent to Submit (Form VET-A) **may be** submitted by 5 p.m.  
**(2) (Mandatory) Thursday, June 1, 2000** the application **must be** received by 5 p.m.

All items must be submitted to:

**California Department of Education**  
**Education Technology Office**  
**515 L Street, Suite 250**  
**Sacramento, CA 95814**

**Contact person:** Van Wilkinson, [vwilkins@cde.ca.gov](mailto:vwilkins@cde.ca.gov), (916) 323-4709/5715

Note: Applicants should read this CFP thoroughly and review the CDE's Frequently Asked Questions (FAQ) website regarding this CFP (<http://www.cde.ca.gov/edtech/vet>). If questions remain, please contact the CDE (see above).

**Source of funding:** There is **no funding** associated with this call for VETs. The CDE will take all necessary steps to ensure that from the CDE there is no endorsement, advertisement, promotion or favored status given to those volunteers who are selected to assist in training.

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# **Volunteer E-rate Trainer (VET)**

## **I. PROGRAM OVERVIEW**

### **A. Objectives**

The objectives for this Call For Presenters (CFP) are to:

1. Identify and describe the required training requirements and conditions with sufficient detail so that applicants may fairly and accurately compete for selection as a Volunteer E-Rate Trainer (VET).
2. Identify through a competitive process which applicants will best provide the voluntary training assistance under the guidance of the California Department of Education (CDE).
3. Provide the basis for selecting the vendor or vendors best prepared to meet the requirements of this CFP and therefore be offered a Memorandum of Understanding (MOU) with the CDE to operationalize the relationship

### **B. Background**

The federal Universal Service Fund for Schools and Libraries, popularly known as the "E-rate," has brought considerable cost reduction to public education in California for telecommunications-related goods and services. It has also caused public school applicants to forge new relationships with vendors, because the E-rate program requires strict coordination between applicant and vendor as the multiple forms and deadlines roll out during specified funding cycles. For the smaller-sized California public school Local Education Agencies (LEAs) and those LEAs without access to E-rate-conversant staff, the program presents daunting obstacles, often resulting in their non-participation or resulting in their uninformed reliance on advice or solutions that may put them in jeopardy.

The California Teleconnect Fund (CTF), although a less complex program from the applicant's perspective, is under-utilized statewide. By combining E-rate and CTF discounts, in that order, successful applicants can save significantly on necessary telephone, telecommunications, and Internet-related networking costs, narrowing the gap between "connected" and "non-connected schools."

In these two programs, E-rate and CTF, vendors have acquired valuable knowledge and operational familiarity with some of the more complex aspects of successfully applying for these programs. It is the CDE's intent to collaborate with the selected VETs so that the California public education community can benefit from this expertise. Additionally, the VET collaborative will widen the base of agreed-upon approaches to E-rate and CTF so that both the vendor community and the California public education applicants will be delivering the same messages.

### **C. Role of the California Department of Education (CDE)**

The CDE's Education Technology Office will conduct the CFP competition, choose the vendor(s), and proceed with the collaborative. Further, the CDE's Education Technology Office will:

1. provide statewide coordination, planning, and delivery of training in the VET collaborative;
2. provide the VETs with necessary CDE publications and data;

3. monitor and evaluate VET activities for effectiveness;
4. act to change the training and/or trainers as necessary to achieve effectiveness; and
5. approve all materials or products developed under the terms of the VET CFP and the MOU.



## II. GENERAL APPLICATION INFORMATION

### A. Critical Dates and Application Submission Information

**(Optional) Intent to Submit:** Completed Intent to Submit forms (Form VET-A) must be in the possession of CDE's Education Technology Office no later than 5 p.m. on Wednesday, May 22, 2000.

**(Mandatory) Applications:** Completed applications must be in the possession of CDE's Education Technology Office no later than 5 p.m. on Wednesday, June 1, 2000. Applications delivered by hand on the deadline date will not be accepted after 5 p.m. All applications must be received on or before that date to be considered. Late submissions will not be considered. Submittal of a proposal constitutes a release of information and waiver of the individual's right of privacy with regard to information provided in response to the CFP. Ideas and formats presented in any proposal will become the property of the CDE.

**Table 1: Timeline of Critical Dates**

<b>Date</b>	<b>Activity</b>
May 5, 2000	The CFP will be sent to trade associations, vendors, and contractors whose experience with the E-rate and/or CTF program is substantial and whose record is positive in the area of delivering E-rate training.. This CFP is made available to the public and others requesting a copy. This CFP will also be available on the CDE Web site.
May 22, 2000	<b>(Optional)</b> Complete Intent to Submit (Form VET-A) must be in the possession of the CDE's Education Technology Office no later than 5 p.m.
June 1, 2000	<b>(Mandatory)</b> Complete applications must be in the possession of the CDE's Education Technology Office no later than 5 p.m.
June 2-8, 2000	Applications are read and scored.
June 9, 2000	The CDE's Education Technology Office posts selected vendor(s) and notifies applicants by fax. The applicant(s) selected for funding will be required to sign a Memorandum of Understanding (MOU) with the State of California.
June 21, 2000	Anticipated date of the first meeting among CDE and VETs to prepare a work plan and a schedule of trainings. Meeting location: Sacramento.

## **B. Scope of Services**

Applicants should be aware that they are volunteering their services on behalf of California public education under the general direction of the California Department of Education (CDE) or its designees. Successful applicants must be available during the period of July 2000 through December 2000 for a series of trainings throughout California, the exact number or location(s) of which is unknown at this time but will be established through collaborative meetings among the CDE and the VETs. As a minimum, the successful VET must be available for four (4) such trainings during this time period.

The trainings will generally be presentations to audiences, with a question-and-answer component. Some trainings may be conducted at computer labs where applicants can practice online filing or use computer-aided simulations.

Participation in CDE training does not preclude a VET from conducting its own training or participating in other E-rate training.

All costs of travel, supplies, equipment, and other incidentals associated with a VET's training shall be borne by the VET. The CDE will supply the CDE-approved training materials. All contributions a VET may make to the CDE-training materials (e.g., slide presentations, descriptions or directions, text, graphics, digitized data) become the property of the CDE and may be made publicly accessible.

## **C. Application Review and Award Process**

Each application will be evaluated using a two-step process to determine responsiveness to the requirements and standards as described in this CFP. Consistent with the requirements of this CFP, the CDE reserves the right to not select any or all applications. In the event an insufficient number of VETs is selected for this service, another round of applications may be solicited and any previous applicants will be allowed to strengthen their applications and resubmit them for reconsideration, along with any new applications that might be submitted at that time.

In Step I, "Application Format," applications will be evaluated on a yes/no basis as described below. Receipt of a "no" will result in the applicant being contacted and given the opportunity to fax the corrected section of the application within two (2) working days of the request from CDE.

In Step II, "Performance Evaluation," a review panel will score applications using the Rating Criteria included in this CFP.

The highest scoring applications may be selected. The CDE reserves the right to not select any or all applications, based on the contents and quality of the application as determined by the CDE, regardless of the score(s) achieved during the evaluation process. In the event an application that receives fewer than 75 percent of the total points is selected, the applicant will be required to work with the CDE to strengthen the application in the weak area(s) until the application has been strengthened to the CDE's satisfaction.

### **Step I, Application Format**

Applications will be screened for compliance with the following format requirements:

1. Five (5) copies plus one original, for a total of six (6), must be submitted by the June 1, 2000, deadline.
2. All required components, forms, and attachments must be included.
3. The title page of the application must be signed by an authorized representative of the applicant.
4. All pages, including all narratives, forms, resumes, or attachments must be sequentially numbered.  
Note: Hand-written page numbers are acceptable.
5. All narrative pages must include line numbers. Pages should be individually numbered, with the first line of each page being line #1. Note that attachments are not considered part of the narrative and do not have to be line-numbered.
6. All narrative pages may not contain more than 24 lines per page. If tables or graphics are included, the number of lines of text on the page must be decreased to provide room for the tables or graphics. Additionally, any charts must not increase the word count for the page to exceed the number typically found on a page with 24 lines of text.
7. The narrative may not exceed five (5) total pages, exclusive of the required forms and attachments.

Applicants are encouraged to format applications in a professional and easy-to-read manner. For example, it is recommended that a minimum font size of 12 be used to promote readability. It is also recommended that each application section be clearly labeled and that each page be double spaced.

Reviewers will have a limited time to read each application. Any appendix, brochures, or supplementary materials not specifically required should not be submitted. If submitted, these items will be pulled from the application package. These items will not be reviewed when the application is scored, nor will they be returned to the applicant.

## Step II, Performance Evaluation

The applications will be evaluated and scored based upon the rating criteria included in this application. A panel of approximately three (3) readers appointed by CDE will score each application. These readers will represent appropriate and necessary education technology leadership groups and constituencies. Readers must not have a conflict of interest nor shall they be vendors. Each reader will score each application independently. The readers will then discuss the application and write comments together. If the total scores for each application are identical or if the range of the scores is 25 points or less, the scores are "in agreement" and will be averaged to yield the total score from the readers. If the range of the readers' scores exceeds 25 points and the readers are not able to resolve the differences, the scores from this panel will be set aside. The application will be re-scored by a new panel of three other readers. This panel will read the application until the readers are able to assign scores that are in agreement.

By June 9, 2000, applicants will receive via fax the results of the evaluation and a notice of the proposed VET(s). A notice of the proposed lead agencies will be posted by June 9, 2000, at:

California Department of Education  
Education Technology Office  
515 L Street, Suite 250  
Sacramento, CA 95814

In the event an applicant wishes to protest the recommendation, the applicant must file a protest within five (5) working days of the notice of the proposed VETs. Only applicants may protest the award.

Protests shall be limited to the grounds that the CDE failed to correctly apply the standards for reviewing the format requirements or the review panel failed to correctly apply the standard for evaluating the applications as specified in the CFP. The protesting applicant must file a full and complete written protest, including the issue(s) in dispute, the basis for the agency's position, and the remedy sought. Protests must be addressed to:

Nancy Sullivan, Manager  
Education Technology Office  
California Department of Education  
515 L Street, Suite 250  
Sacramento, CA 95814

The Education Technology Office will forward appeals to the Chief Deputy Superintendent (or the Chief's designee) who will meet with another deputy and a representative from the CDE Legal Office to decide how the protest is to be handled. Their decision shall be the final administrative action afforded the protesting vendor.

The applicant(s) selected will be required to sign a Memorandum of Understanding (MOU) with the State of California.



### III. HOW TO APPLY

#### A. Instructions for Submitting an Application

##### 1. Due Dates

**(Optional) Intent to Submit:** A complete Intent to Submit form (Form VET-A) may be in the possession of the CDE's Education Technology Office no later than 5 p.m. on Wednesday, May 22, 2000. Completion of this form is a not mandatory part of the application process. A fax submission is acceptable.

CDE will also post a list of applicants that returned an Intent to Submit form by the due date on the Education Technology Office Web page: <http://www.cde.ca.gov/vet/>.

Potential applicants should be aware that there is no penalty for forwarding an Intent to Submit form on or before the deadline and then, subsequently, withdrawing that intent. In the event a potential applicant indicates an intent to submit and later decides not to submit an application, that potential applicant is encouraged to notify CDE of the intent not to participate in the application process. CDE will update the list of applicants on the Education Technology Office Web page if it receives notification of a change in potential applicants.

**(Mandatory) Applications:** Completed applications must be in the possession of the CDE's Education Technology Office no later than 5 p.m. on Thursday, June 1, 2000.

Mailing address for applications:

California Department of Education

Education Technology Office  
515 L Street, Suite 250  
Sacramento, CA 95814

Applications delivered by hand will be accepted daily at the above address between the hours of 8 a.m. and 5 p.m., except Saturdays, Sundays, or State holidays.

2. Number of Copies to Submit

**Intent to Submit:** Only one Intent to Submit form needs to be submitted.

**Applications:** All applicants are required to submit one (1) signed original (labeled as “original,” unbound and suitable for photocopying) and five (5) copies of the application. The original and each copy of the application must be covered with a Title Page (included as Form VET-B in this application) or a reasonable facsimile. Except for the one unbound original referenced above, all copies of the applications must be stapled or bound in such a manner that the application is flat. Do not submit applications in binders.

**B. Application Sections and Forms**

Applications must contain the following:

1. Application Title Page (Form VET-B): Applicants must use the title page provided in this application or a reasonable facsimile. This page is not scored. This page must be signed by the individual qualified to make the offer to volunteer the work described. The individual signing this letter must indicate his/her position title. The primary contact person listed on this form should be someone who can quickly respond to requests for information regarding the application.
2. Qualifications: This section is scored for a total of 100 points. The number of points assigned to each of the required subsections is included below. In total, the Qualifications must describe in detail the applicant’s prior training history related to E-rate and/or CTF and the applicant’s capacity to volunteer to assist the CDE in conducting future trainings in the July 2000-December 2000 period.
  - a. History. (**50 points**) In this section, the applicant must address:
    - (1) the applicant's history of training related to E-rate and/or CTF;
    - (2) the applicant's lead trainers, by name and title; and,
    - (3) any other relevant considerations to establish the applicant as having a sufficient experience with E-rate and/or CTF to be a valuable VET.
  - b. Capacity. (**50 points**)
    - (1) the applicant's interest in serving as a VET, assisting the CDE in conducting future trainings in the July 2000-December 2000 period;
    - (2) the applicant’s capacity to collaboratively design and deliver training materials to the CDE for trainings in the July 2000-December 2000 period; and,
    - (3) the applicant's anticipated lead trainers, by name and title, to be used in this volunteer collaborative.





## **V. MISCELLANEOUS TERMS AND REQUIREMENTS**

### **A. Responsibilities of the CDE**

Representatives from the CDE's Education Technology Office will coordinate the work of the VETs and will be available for meetings (which may be phone conferences or teleconferences) to answer questions and provide guidance.

### **B. Ownership of Materials**

All materials developed under the terms of this CFP and subsequent MOU shall become the property of the CDE. The CDE reserves the exclusive right to copyright such material and to publish, disseminate and otherwise use these materials. VETs and others may be allowed to use these materials under conditions to be set forth by the CDE as the materials are developed, tested, and delivered.



## VI. RATING CRITERIA AND EVALUATION

### Step I: Application Format (Rated on a yes/no basis)

Applicant \_\_\_\_\_

Name \_\_\_\_\_

Volunteer Collaborative: **Volunteer E-rate Trainer (VET)**

If more than one applicant: Applications that do not comply with the format requirements will be disqualified from the competition. Disqualified applications will not be scored in Step II. Applicants will not be allowed to correct deficiencies and resubmit their application for consideration in this round of competition.

If only one applicant: Applications that do not comply with the format requirements will be called on the telephone and informed of the error. To maintain their eligibility in this round of competition, applicants will be required to submit the missing or corrected item(s) via fax by 5 p.m. of the second business day following the day of the request from CDE.

- \_\_\_\_\_ 1. Five (5) copies plus one original, for a total of six (6), submitted by the June 1, 2000, deadline.
- \_\_\_\_\_ 2. All required components, forms, and attachments are included.
- \_\_\_\_\_ 3. The title page is signed by an authorized representative.
- \_\_\_\_\_ 4. All pages, including all narratives, forms, and required attachments (including resumes if applicable) are sequentially numbered. Note: Hand-written numbers are acceptable.
- \_\_\_\_\_ 5. All narrative pages include line numbers. Pages are individually numbered, with the first line of each page being line #1. Note that attachments are not considered part of the narrative and do not have to be line-numbered.
- \_\_\_\_\_ 6. All narrative pages contain no more than 24 lines per page. If tables or graphics are included, number of lines of text on the page was decreased to provide for the tables or graphics. Additionally, any charts do not increase the word count for the page to exceed the number typically found on a page with 24 lines of text.
- \_\_\_\_\_ 7. The narrative does not exceed five (5) total pages, exclusive of the forms, surveys, and resumes.

## Step II: Volunteer E-rate Trainer (VET) CFP Performance Evaluation Sheet

Applicant Name \_\_\_\_\_

Points Earned

- a. History. **(50 points)** In this section,  
the applicant must address: \_\_\_\_\_

- (1) the applicant's history of training related to E-rate and/or CTF;
- (2) the applicant's lead trainers, by name and title; and,
- (3) any other relevant considerations to establish the applicant as having a sufficient experience with E-rate and/or CTF to be a valuable VET.

- b. Capacity. **(50 points)** In this section,  
the applicant must address: \_\_\_\_\_

- (1) the applicant's interest in serving as a VET, assisting the CDE in conducting future trainings in the July 2000-December 2000 period;
- (2) the applicant's capacity to collaboratively design and deliver training materials to the CDE for trainings in the July 2000-December 2000 period; and,
- (3) the applicant's anticipated lead trainers, by name and title, to be used in this volunteer collaborative.

TOTAL

100 points \_\_\_\_\_

Reader's name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_  
*Printed*

## Appendix I: Forms

The forms listed below are available in PDF format under the Education Technology Office's Web site:  
<http://www.cde.ca.gov/vet/>.

VET-A	Intent to Submit
VET-B	Application Title Page

**VET-A: Intent to Submit**  
**Volunteer E-rate Trainer (VET)**  
**(Optional) Due: Monday, May 22, 2000**

Please fax this form to the number below so it is received no later than 5 p.m. on Wednesday, May 22, 2000.

Return to:  
Education Technology Office  
California Department of Education  
515 L Street, Suite 250  
Sacramento, Ca 95814  
Fax to (916) 323-5110

DEPT. OF EDUCATION USE ONLY	
Application Number	Fiscal Year
	<b>2000</b>

Applicant \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Contact person \_\_\_\_\_ Title \_\_\_\_\_

FAX: \_\_\_\_\_ Phone \_\_\_\_\_ E-mail \_\_\_\_\_

\_\_\_\_\_  
Signature of Authorized Representative Date

**VET-B: Application Title Page**  
**Volunteer E-rate Trainer (VET)**  
**(Mandatory) Due: Thursday, June 1, 2000**

Return to:  
Education Technology Office  
California Department of Education  
515 L Street, Suite 250  
Sacramento, Ca 95814  
Fax to (916) 323-5110

DEPT. OF EDUCATION USE ONLY	
Application Number	Fiscal Year
	<b>2000</b>

Applicant \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Contact person \_\_\_\_\_ Title \_\_\_\_\_

FAX: \_\_\_\_\_ Phone \_\_\_\_\_ E-mail \_\_\_\_\_

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date